



University of New Haven

IRA Charitable Transfer Instructions

Date: _____

To: _____
(Firm that administers my IRA Account)

Address: _____

City/State/Zip _____

From:

Name: _____

Address: _____

Phone number: _____ Email: _____

I am hereby requesting that you make a direct qualified charitable distribution from my Individual Retirement Account # _____ to the University of New Haven as provided for under the Tax Increase Prevention Act of 2015 and section 408(d)(8) of the Internal Revenue Code of 1986, as amended. The University of New Haven's tax identification number (EIN) is 06-0761704.

____ Please transfer funds, or issue a check, in the amount of \$ _____, payable to the **University of New Haven** and mail to address on page 2.

____ Please transfer the following securities to the University of New Haven (Name and number of shares):

For instructions to wire transfer securities, please use this link:

www.newhaven.edu/give/ways-to-give/securities.php

In your transmittal to the University of New Haven, please include both pages of this form, which shows my name and address as the donor of record, indicates that the transfer is being made from my IRA account, and notifies the University of the purpose of my gift. Please copy me on your transmittal.

If you need to contact me, I can be reached at the following phone number: _____, or the following email address: _____.

Thank you for your assistance with this transfer.

Sincerely,

Printed name: _____

Signature: _____

Donor Instructions to the University of New Haven

I intend my gift to be used for the following purpose:

____ Unrestricted Annual Fund

____ Annual Scholarship Fund

____ Pledge Payment on my existing pledge for _____

Establishing a new named fund - we will contact you for details

Phone number: _____

____ Other, please specify: _____

Printed donor name: _____

Signature: _____

Date: _____

If you would like to transfer funds directly, please email gifts@newhaven.edu for wire transfer instructions.

So that we may properly credit this gift for the intended purpose, please send a copy of this form to Advancement Services at gifts@newhaven.edu or the address below.

If sending the donation by mail, please enclose a copy of this form and mail to:

**Office of Advancement
University of New Haven
300 Boston Post Road
West Haven, CT 06516**

For questions, please contact Ali Cranshaw, Assistant Vice President, Major Gifts and Development/Alumni Services, at acranshaw@newhaven.edu or 203-932-7080.